

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
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Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Postsecondary National Policy Institute (PNPI)

Private Sponsor(s) (list all): _____

Travel date(s): **May 30-31, 2018**

Name of accompanying family member (if any): **N/A**

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$61.75 (round trip shuttle to Kent Manor Inn)	\$117	\$90.85	\$0
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	N/A	N/A	N/A	N/A
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): **Attended a bootcamp on the federal budget and appropriations process. See agenda for**

additional information.

6/18/18
(Date)

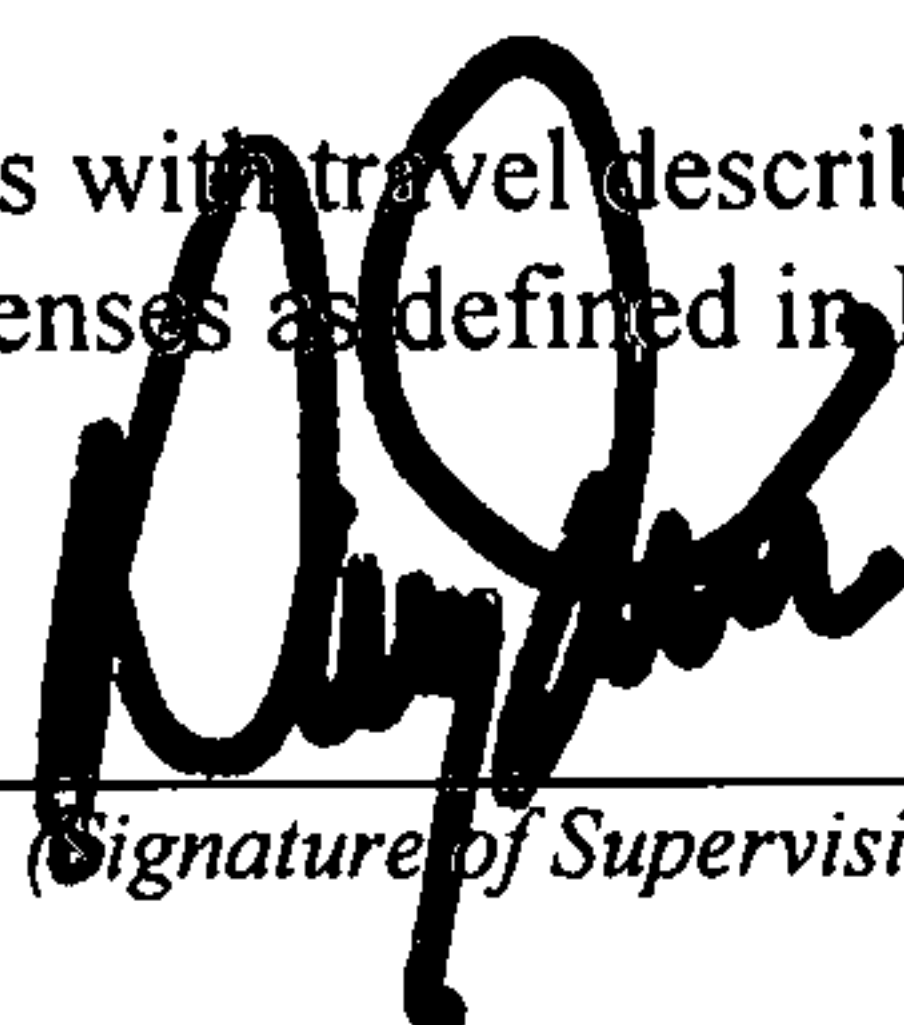
Rebecca Howard
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

6/18/18
(Date)


(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Rebecca Howard

Employing Office/Committee: Senator Jones

Private Sponsor(s) (list all): Postsecondary National Policy Institute

Travel date(s): May 30-31, 2018

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Stevensville, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

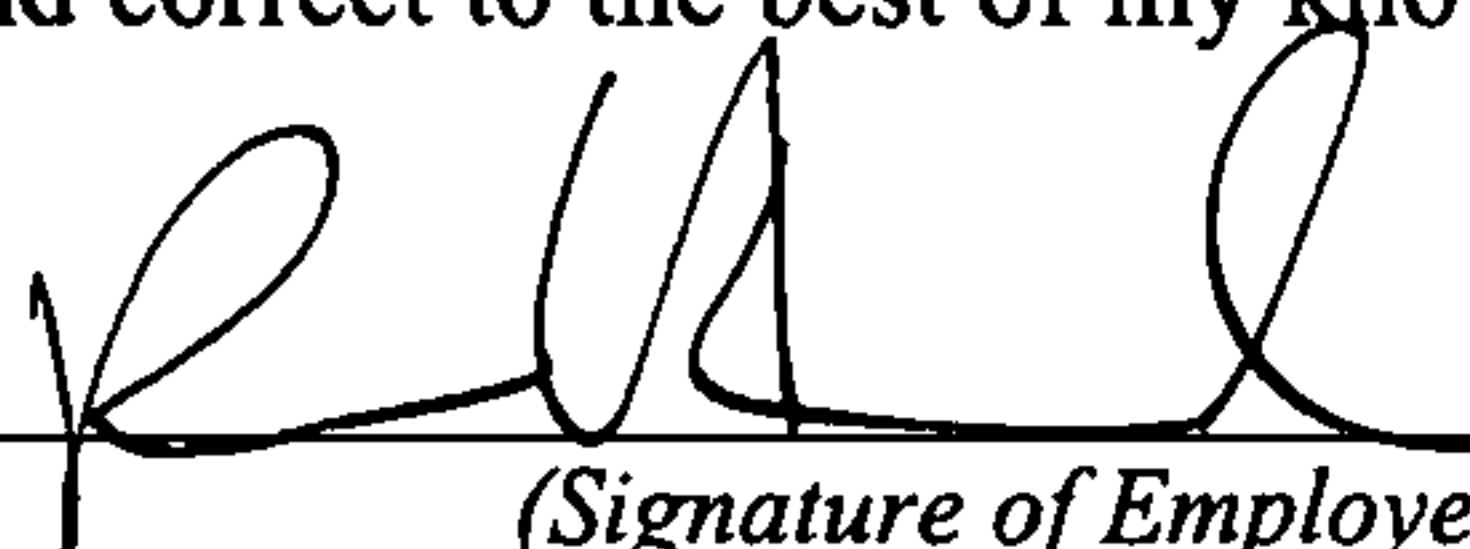
As the Senator's education staffer, this trip is an opportunity to learn more about the federal budget process to better inform my boss and his thinking. As the Senate gets closer to reauthorizing the Higher Education Act, the information learned here could go a long way.

Name of accompanying family member (if any): N/A

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

5/1/18
(Date)


(Signature of Employee)

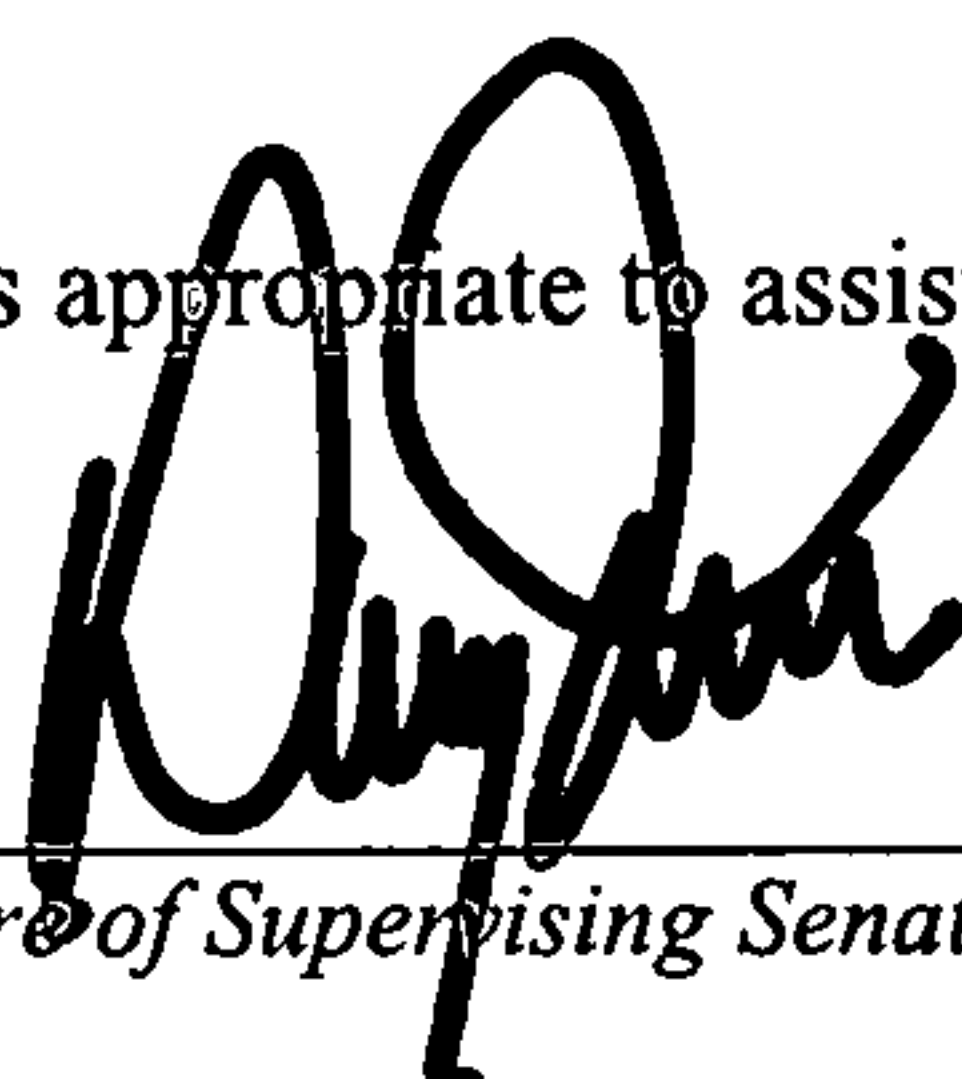
TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Doug Jones hereby authorize Rebecca Howard
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☒

5/1/18
(Date)


(Signature of Supervising Senator/Officer)



The Federal Budget and Appropriations Process

Wednesday, May 30 - Thursday, May 31
Stevensville, MD

SEMINAR GOALS

- Increase participants' knowledge of the federal budget process including budget reconciliation;
• Increase participants' understanding of how the Congressional Budget Office is organized and works;
• Increase participants' knowledge of how student loans are budgeted in the federal budget;
• Increase participants' understanding of the congressional appropriations process; and
• Expand participants' knowledge of the federal Pell Grant Program - the difference between mandatory and discretionary funding and the history of shortfalls and surpluses.

AGENDA

Wednesday, May 30

- | | |
|---------------------|---|
| 8:15am | Staff arrive to board shuttle
Peace Circle (located by the reflecting pool on the northwest side of the U.S. Capitol)
Pennsylvania Ave. and First Street NW
Washington, D.C. |
| 8:30am | Depart Peace Circle |
| 9:45am | Arrive at Kent Manor Inn
500 Kent Manor Drive
Stevensville, MD 21666 |
| 9:45-10:00am | Check-In and Registration |

10:00-11:30am

Welcome & The Federal Budget Process

Speakers:

MaryEllen McGuire, PNPI

Nick Lee, former Program Examiner, Education Branch, White House Office of Management and Budget (OMB), The Bill and Melinda Gates Foundation (current employer)

Robyn Hiestand, Independent Budget and Policy Consultant

Questions for Panelist Discussion:

- How does the federal budget process work?
How do CBO and OMB fit in? What is the difference in their roles?
What is the Budget Control Act of 2011? How does it play into the process?
What is budget reconciliation?
What impacts do the budget and reconciliation have on higher education policy?
- What happens if a budget resolution isn't passed?
- What is the difference between discretionary and mandatory spending?
What are discretionary caps?
How does the federal debt fit in? What is the difference between deficits and debt?

11:30-11:45am

Break

11:45am-1:00pm

Simulation: Reconciliation

Simulation Facilitators:

Robyn Hiestand, Independent Budget and Policy Consultant

MaryEllen McGuire, President, Postsecondary National Policy Institute

Attendees will participate in an interactive appropriations simulation facilitated by former Hill staff.

1:00-2:00pm

Lunch – Ask a Budget Expert!

Lunch will provide an opportunity for staff to ask our budget panelists additional questions in a smaller group setting.

2:00-3:15pm

The Congressional Budget Office & How the Government Budgets for Student Loans

Speakers:

Peter Fontaine, Professorial Lecturer, George Washington University

Justin Humphrey, Analyst, Congressional Budget Office

Questions for Panelist Discussion:

- What is CBO? Why was CBO created and how has it evolved over time?
How is CBO staffed and organized?
What does CBO do?
- How does CBO decide what to review?
How does CBO arrive at its estimates? What is CBO's methodology?
Where does CBO get its data?

Who reviews CBO's work? How does CBO ensure objectivity?

3:15-3:30pm

Break

3:30-4:45pm

The Pell Grant: A Case Study

Speaker:

Leah Koestner, Principal Analyst, Congressional Budget Office

Questions for Panelist Discussion:

- What is the difference between Pell's mandatory and discretionary funding? Why is Pell funded in two ways?
- How and why has Pell shifted from shortfalls to surpluses over time? What has driven or is driving these shortfalls or surpluses?

4:45-5:00pm

Wrap-Up & Close

Questions for Participant Discussion:

- What were your big takeaways from today?
- What have you learned about the federal budget process that surprised you?
- What further questions do you have regarding the federal budget process?

5:00-5:30pm

Break

5:30-7:00pm

Dinner & Day Two Preview

Over dinner, PNPI staff will provide a preview of the panels for the second day of programming, with an emphasis on exploring what staff know, don't know, and would like to know about the federal appropriations process.

Questions for Participant Discussion:

- Going into tomorrow's programming, what more would you like to learn?
- What are some specific questions that you have about the federal appropriations process?

Thursday, May 31

8:00-9:00am

Breakfast

9:00-10:30am

Welcome Back & The Federal Appropriations Process

Speakers:

Jessica Bowen, Associate Federal Director, Postsecondary National Policy Institute

Zach Moller, Senior Policy Analyst, Committee for a Responsible Federal Budget

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What is the appropriations timeline?

Break

Reflections on the Current Budget Proposal

Mamie Voight, Vice President of Policy Research, Institute for Higher Education Policy

- What parts of the bill do you feel are most promising for students?
- Are there winners and losers in the bill as it now stands? Who are the likely winners and losers?
- Did anything in this bill surprise you?
- Do pieces of it worry you?

What impact do you think this bill will have?

Lunch – Ask a Budget Expert!

Lunch will provide an opportunity for staff to ask our budget panelists additional questions in a smaller group setting.

Close & Evaluation

- How might you apply what you learned to your current work?
Is there a part of the process you'd like to learn more about?

Depart from Kent Manor Inn

Arrive at Peace Circle, Washington, D.C.

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